

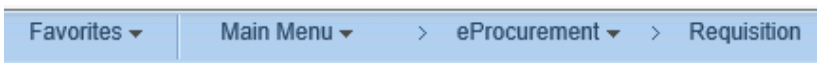


**LAST REVISED DATE: 04/29/2022**

## General Information

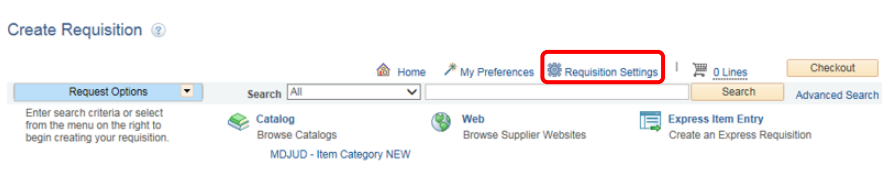
Task	Process Information
<p><b>Creating an eProcurement Requisition for asset purchases to be received in offices or courts locally (using Special Requests)</b></p> <p>NOTE: If additional assistance is needed, please contact the respective AOC Department staff or the JIS Service Desk.</p>	<p>This Special Request Requisition is created in the eProcurement module for procuring assets that <u>will NOT be received in an Inventory Warehouse location</u>.</p> <p>NOTE: An Asset Profile ID is required when using an asset-related category/account (0701, 10xx, 11xx, 14xx) on a requisition or PO.</p>

## GEARS Navigation

Main Menu > eProcurement > Requisition	
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## Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.

STEP	ACTION	DETAILS
1.	<p>Click on the link <a href="#">Requisition Settings</a>. This is where you'll setup the <u>defaults</u> for your Requisition.</p>	

2. On the pop-up window that opens, enter your **Requisition name**.

**NOTES:**


- A. It is important to give your requisition a meaningful name to make it easier to find later. Be sure to start the Requisition Name with the corresponding AY year. For example, **AY17 Sharp Maint Review**.

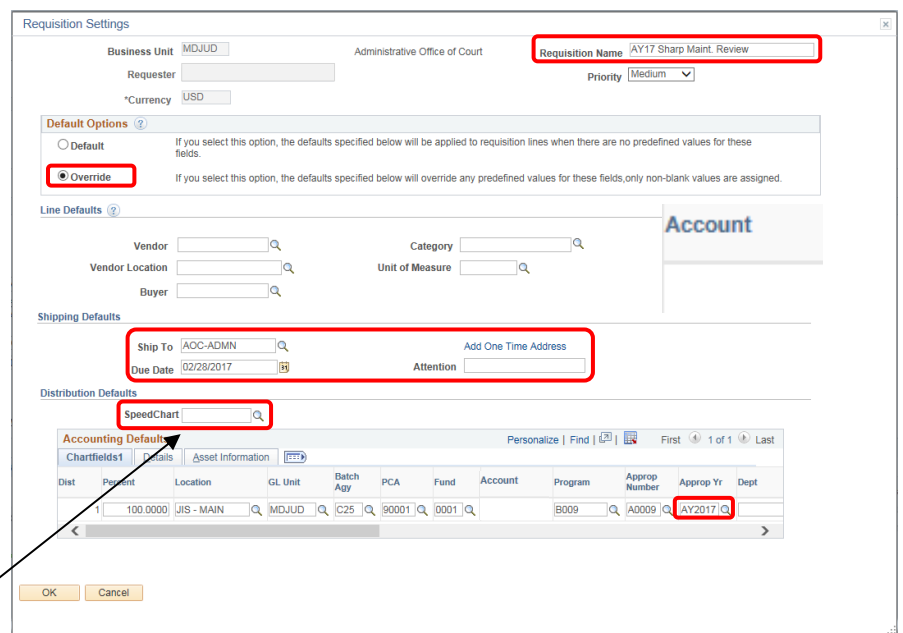
Requisition Name:

- B. Click on the **Override** radio button.

The defaults entered on steps C & D will populate on **ALL** your requisition lines.

- C. Enter the **Ship To**, **Due Date** and **Attention** fields, if needed. **NOTE:** The **Ship To** should **NOT** be a warehouse location (AOCWH02, DCITWH01, DCWH02, etc).

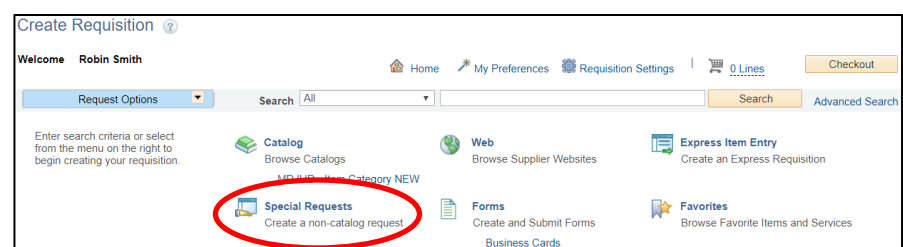
- D. To use the **SpeedChart** field, you can search for your PCA by using the  feature. Notice that the **Account** and **Approp Yr** Chartfields are blank and **Account** is grayed out. Enter the **Approp Yr**.



**Multiple PCA's per line:** If you need to divide the expenses on your Req. lines to multiple PCA's on a percentage basis, it can be done on this page. Please contact GEARS support, if you need help with this feature.



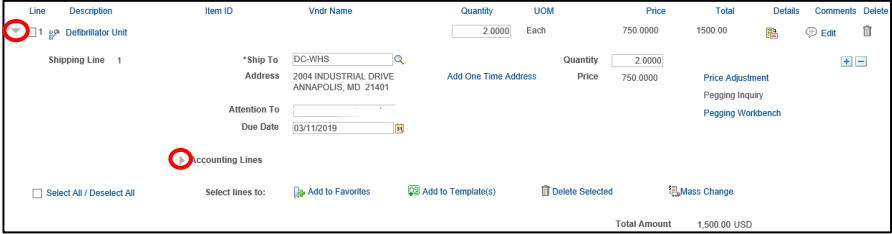
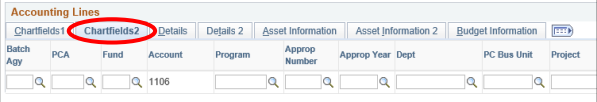
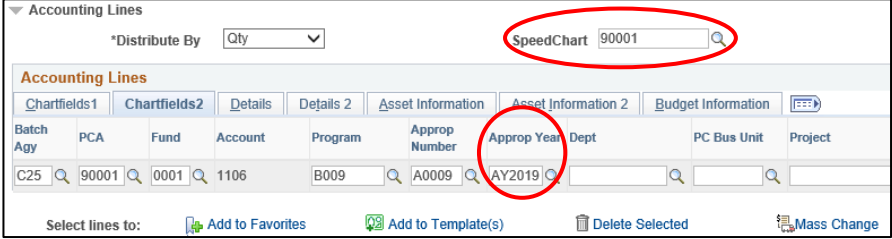
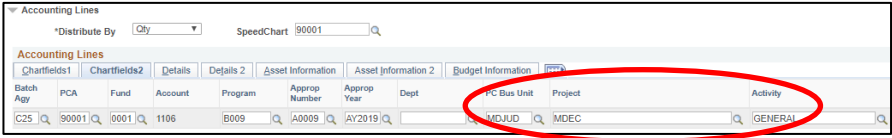
3. Click the **OK** button.

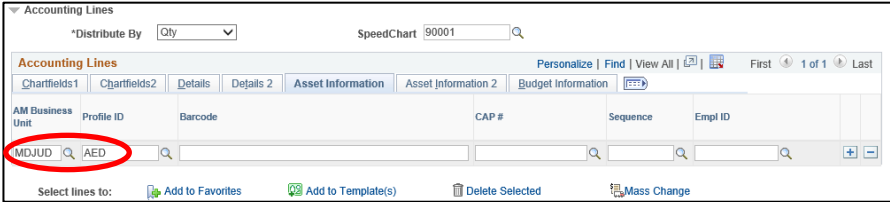

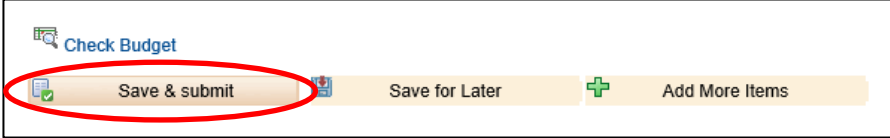

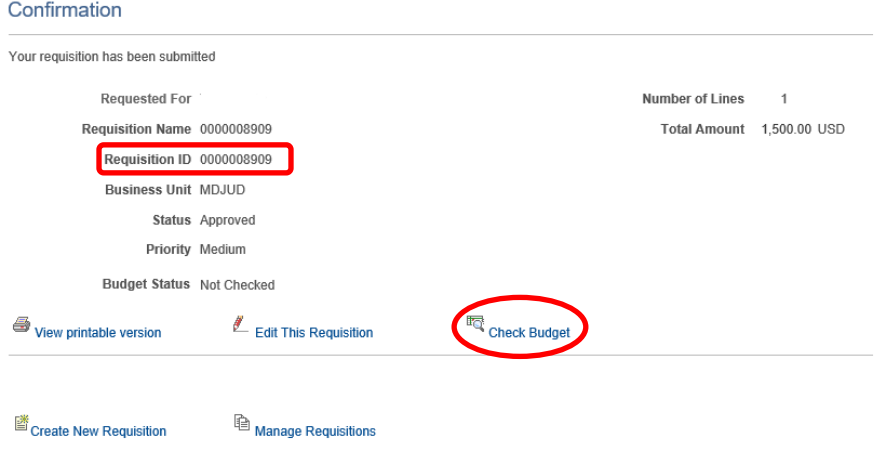
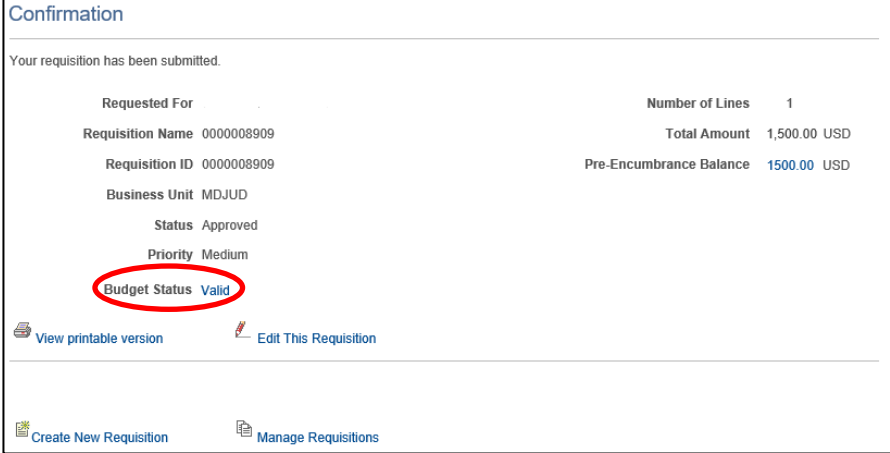
4. Click on the link for **Special Requests**.



<p>5.</p>	<p><b>Enter/select the following:</b></p> <p><b>Item Description</b>  <b>Price</b>  <b>Quantity</b>  <b>Unit of Measure</b>  <b>Category (Account)</b>  <b>Manufacturer ID</b>  <b>Manufacturer's Item ID (Model)</b></p> <p><b>NOTE:</b> Be sure to use an asset-related Category/Account (0701, 10xx, 11xx, 14xx).</p> <p>Manufacturer ID is a searchable list. Select "Other" if the Manufacturer does not exist in the list, or is unknown.</p> <p>Manufacturer's Item ID (Model) is a free-form text field. Enter an appropriate value.</p>	<div> <div>Special Requests ?</div> <div>Enter information about the non-catalog item you would like to order:</div> <div> <div>Item Details</div> <div> <div>*Item Description</div> <div>DefibrillatorUnit</div> </div> <div> <div>*Price</div> <div>740</div> </div> <div> <div>*Quantity</div> <div>2</div> </div> <div> <div>*Category</div> <div>1106</div> </div> <div> <div>*Currency</div> <div>USD</div> </div> <div> <div>*Unit of Measure</div> <div>EA</div> </div> <div> <div>Due Date</div> <div>06/01/2019</div> </div> </div> <div> <div>Supplier</div> <div> <div>Vendor ID</div> <div></div> </div> <div> <div>Supplier Name</div> <div></div> </div> <div> <div>Supplier Item ID</div> <div></div> </div> <div>Suggest New Supplier</div> </div> <div> <div>Manufacturer</div> <div> <div>Mfg ID</div> <div>483</div> </div> <div> <div>Manufacturer</div> <div>Hewlett Packard</div> </div> <div> <div>Mfg Item ID</div> <div>6475b</div> </div> </div> </div>
<p>6.</p>	<p>Click the <b>Add to Cart</b> button.</p>	<div> <div>Special Requests ?</div> <div>Enter information about the non-catalog item you would like to order:</div> <div> <div>Item Details</div> <div> <div>*Item Description</div> <div>Defibrillator Unit</div> </div> <div> <div>*Price</div> <div>750.00</div> </div> <div> <div>*Quantity</div> <div>2</div> </div> <div> <div>*Category</div> <div>1106</div> </div> <div> <div>*Currency</div> <div>USD</div> </div> <div> <div>*Unit of Measure</div> <div>EA</div> </div> <div> <div>Due Date</div> <div></div> </div> </div> <div> <div>Supplier</div> <div> <div>Vendor ID</div> <div></div> </div> <div> <div>Supplier Name</div> <div></div> </div> <div> <div>Supplier Item ID</div> <div></div> </div> <div>Suggest New Supplier</div> </div> <div> <div>Manufacturer</div> <div> <div>Mfg ID</div> <div></div> </div> <div> <div>Manufacturer</div> <div></div> </div> <div> <div>Mfg Item ID</div> <div></div> </div> </div> <div> <div>Additional Information</div> <div> <div></div> </div> <div> <div><input type="checkbox"/> Send to Supplier</div> <div><input type="checkbox"/> Show at Receipt</div> <div><input type="checkbox"/> Show at Voucher</div> </div> </div> <div> <div>Request New Item</div> <div> <div><input type="checkbox"/> Request New Item</div> <div>A notification will be sent to a buyer regarding this new item request.</div> </div> <div><b>Add to Cart</b></div> </div> </div>

<div>7a.</div> <div><p><b>NOTE:</b> If adding multiple items (lines), you may want to click on the <b>Checkout</b> button after adding the first item to the cart.</p><p>Next click on <b>Save for Later</b>. The “Save for Later” saves the requisition in the system with a Requisition ID, so that you can return to it at any time.</p><p>To continue adding items, you can either click on <b>Add More Items</b>, or you can exit the requisition and return later using the Manage Requisitions page.</p></div>	<div><div><div><div><div>Home</div><div>My Preferences</div><div>Requisition Settings</div><div>1 Line</div><div>Checkout</div></div><div><div>Search</div><div>All</div><div>Search</div><div>Advanced Search</div></div><div><div>Special Requests</div><div>Enter information about the non-catalog item you would like to order:</div><div><div>Item Details</div><div><div>*Item Description</div><div><div>*Price</div><div>*Quantity</div><div>*Category</div></div><div><div>*Currency</div><div>*Unit of Measure</div><div>Due Date</div></div></div></div></div><div><div>Check Budget</div><div>Save &amp; submit</div><div>Save for Later</div><div>Add More Items</div><div>Preview Approval</div><div>Add Request Document</div></div><div><div>Requisition Settings</div><div><div>Business Unit</div><div>MDJUD</div><div>Admin: Office of the Courts</div><div>Requisition Name</div><div>Non-assist save for later</div><div>Requisition ID</div><div>000015478</div><div>Priority</div><div>100000</div></div></div><div><div>Favorites</div><div>Main Menu</div><div>eProcurement</div><div>Manage Requisitions</div></div></div></div></div>																						
<div>7b.</div> <div><p>When done adding all items (lines), click on the <b>Checkout</b> button and proceed.</p></div>	<div><div><div><div><div>Home</div><div>My Preferences</div><div>Requisition Settings</div><div>1 Line</div><div>Checkout</div></div><div><div>Search</div><div>All</div><div>Search</div><div>Advanced Search</div></div><div><div>Special Requests</div><div>Enter information about the non-catalog item you would like to order:</div></div></div></div></div>																						
<div>8.</div> <div><p>Select the <b>Add Comment</b> icon at the far right of the line.</p></div>	<div><div><div><div>Requisition Lines</div><table><tr><th>Line</th><th>Description</th><th>Item ID</th><th>Vndr Name</th><th>Quantity</th><th>UOM</th><th>Price</th><th>Total</th><th>Details</th><th>Comments</th><th>Delete</th></tr><tr><td>1</td><td>Defibrillator Unit</td><td></td><td></td><td>2.0000</td><td>Each</td><td>750.0000</td><td>1500.00</td><td></td><td></td><td></td></tr></table><div><div>Select All / Deselect All</div><div>Select lines to:</div><div><div>Add to Favorites</div><div>Add to Template(s)</div><div>Delete Selected</div><div>Mass Change</div></div></div></div></div></div>	Line	Description	Item ID	Vndr Name	Quantity	UOM	Price	Total	Details	Comments	Delete	1	Defibrillator Unit			2.0000	Each	750.0000	1500.00			
Line	Description	Item ID	Vndr Name	Quantity	UOM	Price	Total	Details	Comments	Delete													
1	Defibrillator Unit			2.0000	Each	750.0000	1500.00																
<div>9.</div> <div><p>You can add comments in the <b>Comments Section</b>, and also click on the <b>Add Attachments</b> button to add attachments.</p><p>When done, select the <b>Send to Supplier</b> checkbox.</p><p>Click the <b>OK</b> button.</p></div>	<div><div><div><div><div>Line Comment</div><div><div>Business Unit</div><div>MDJUD</div><div>Requisition Date</div><div>03/11/2019</div><div>Status</div><div>Pending</div></div><div><div>Line</div><div>1</div></div><div><div>Comments</div><div>Find</div><div>First</div><div>1 of 1</div><div>Last</div></div><div><div>Entered On:</div><div></div></div><div><div>1</div><div>Defibrillators should be serialized</div><div><div><div><div>Send to Supplier</div><div>Show at Receipt</div><div>Show at Voucher</div></div><div><div>Add Attachments</div><div>OK</div><div>Cancel</div></div></div></div></div></div></div></div></div>																						

<p>10.</p>	<p>Existing Line Comments are indicated by the “Edit Comment” icon containing blue lines.</p> <p>Click on the  icon to the left of the Line. Then click on the  icon to the left of Accounting Lines to expand, if not expanded.</p>	<p>Comments</p> <p>Edit</p> 
<p>11.</p>	<p>Click on the <b>Chartfields2</b> tab to enter/review your chartfield information.</p>	
<p>12.</p>	<p>If you need to enter/change the PCA, you can do that by entering the PCA in the <b>SpeedChart</b> field.</p> <p>If you change the PCA, you'll also have to re-enter the <b>Approp Yr</b>.</p>	
<p>13.</p>	<p><b>For JIS Projects</b>, enter PC Bus Unit (MDJUD), and enter the appropriate Project, Activity and Source Type.</p>	

<p>14.</p>	<p>Click on the <b>Asset Information</b> tab and enter the following:</p> <p><b>AM Business Unit (MDJUD)</b> <b>Profile ID</b></p> <p><b>NOTE:</b> A Profile ID is required when using an asset-related category/account (0701, 10xx, 11xx, 14xx) on a requisition or PO.</p>	
<p>15.</p>	<p>Click the  <b>Save &amp; submit</b> button.</p>	
<p>16.</p>	<p>On the Confirmation page, you'll see the assigned Requisition ID.</p> <p><b>Budget Check</b> your requisition. by clicking on the  <b>Check Budget</b> link.</p>	
<p>17.</p>	<p>After the budget check is complete, verify that the Budget Status is Valid.</p> <p>Depending on the rules that apply to your area, your Requisition will be routed for the necessary Approvals. You'll receive email notifications and Worklist Items in your Worklist when:</p> <ul style="list-style-type: none"> <li>A. Your Requisition has been <b>Approved</b>.</li> <li>B. The PO associated with your requisition is <b>Dispatched</b> to the Vendor.</li> </ul>	



End of Document